



Horizon Service Desk: Requirements Definition

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Abstract: Supports CP3947 and gives the detailed requirements definition to allow the transition of the Horizon Systems Helpdesk into the Horizon Service Desk

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0.0 Document Control

0.1 Document History

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1.0	23/02/05	For approval after review	

0.2 Review Details

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0.3 Associated Documents

Reference	Version	Date	Title	Source
CS/PRD/074			Incident Management Process	PVCS
CS/PRD/021			Problem Management Process	PVCS
CS/SER/023			HSD Service Description	PVCS

Unless a specific version is referred to above, reference should be made to the current approved versions of the documents.

0.4 Abbreviations/Definitions

Abbreviation	Definition
CCD	Contract Controlled Document
CEM	Call Enquiry Matrix
First Line (Agent)	A technical support agent who will answer the telephone, log a call, and undertake basic diagnostics in response to a reported fault
HSD	Horizon Service Desk
HSH	Horizon Systems Helpdesk
IMT	Incident Management Team
ITIL	IT Infrastructure Library
KEL	Known Error Library
Phoenix	Powerhelp call handling tool development project
POA	Fujitsu Services: Post Office Account
SDU	Service Delivery Unit
SMC	Service Management Centre
UKME	Fujitsu Services: United Kingdom Mobile Engineering

0.5 Changes in this Version

Version	Changes
1.0	For approval

0.6 Changes Expected



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Changes

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1.0 Summary

The existing Horizon Systems Helpdesk (HSH) provides a call handling facility to Post Office Ltd. that is not fully ITIL (IT Infrastructure Library), compliant in the following areas:

- There is no dedicated end-to-end incident management function
- Where incident management does exist, this is often hampered by the organisational structure with certain functions (Service Management Centre: SMC) outside of the main service desk area
- There is no dedicated problem management function, where this is required in conjunction with Post Office Account (POA). Although not specifically an ITIL requirement of a service desk, we believe a compliant desk should assist Post Office Account (POA) in carrying out the Problem Management process by providing trend analysis of incidents received and the subsequent initiation of problem records where required for ongoing investigation and resolution by POA.
- The existing configuration and asset management systems are not exploited fully in the handling of incidents received. The Horizon Service Desk (HSD) will be fully reliant on POA for all necessary system links and associated service requirements. A separate programme of work is being carried out within POA to review the entire Configuration and Asset management systems and any developments which impact the HSD will be covered by a separate Change Proposal (CP) once this work has been completed.
- Call management within the POA Service Delivery Units (SDU's), does not facilitate accurate reporting and impact assessment of incidents
- The call management system (Powerhelp) requires development to assist in improved incident management

Following the POA Red Alert and the subsequent review of service and technology by external consultants it was recommended that POA create an ITIL compliant service desk function, hereon known as the Horizon Service Desk (HSD), to address the above.

This set of requirements, underpins CP3947 which has been raised to approve the transition of the existing HSH into the HSD within four phases:

- Phase One: Implemented from 07/02/05
- Phase Two: Implemented from 01/04/05
- Phase Three: Implemented from 01/07/05
- Phase Four: Implemented from 01/10/05

2.0 Document Scope

This requirements definition describes the underlying processes / resources that it is believed are required to ensure the transition from the HSH to the HSD within the above timescales and gives the information to enable Core Services to impact CP3947.

3.0 Phase One: Implemented 07 February 2005

3.1 Implementation of reactive Incident Management within the existing Horizon Systems Helpdesk

- 3.1.1 POA have currently implemented the process whereby all post office branches are telephoned with an incident progress report within 24 elapsed hours where an incident is unresolved and then at 24 hour intervals, or when further updates are received, until the incident is resolved.
- 3.1.2 POA will transfer responsibility for this process to the HSD with effect from Phase Two.
- 3.1.3 The HSH will continue to follow the agreed call script advising post office branches calling the HSH in relation to on line services being unavailable that their service will usually be restored after the initial 48 hours have elapsed. In the event that the service is not restored, the branch will be telephoned on a daily basis with updates as to the progression to resolution of the incident.

4.0 Phase Two: Implemented from 01 April 2005

4.1 Creation of the HSD Incident Management Team (IMT)

- 4.1.1 It is expected that the IMT will be based in Stevenage 09 and be co-located within the same area as the Front Line Call Agents.
- 4.1.2 The IMT will be ring-fenced and will not be used to support the Front Line Agents without due consideration as to the effect on Service Level Target (SLT) conformance or to the detriment of the incident management function. Where there is a potential conflict of interest the HSD will discuss the allocation of resource with POA Service Management.
- 4.1.3 The IMT functionality will be delivered via a dedicated Team Manager following the full impact assessment of resource requirements. The Team Manager will have or will strive to obtain ITIL accreditation in IT Service Management during 2005.
- 4.1.4 The IMT team members will, where possible, be developed in the knowledge of the ITIL principles around Incident and Problem Management.
- 4.1.5 The HSD will take over the process described within 3.1.1 and telephone all branches within 24 hours elapsed time where an incident is unresolved and then at 24-hour intervals, or when further updates are received, until the incident is resolved.

4.2 Implementation of pro-active Incident Management Within the IMT

- 4.2.1 The IMT will monitor all incidents against contractual SLT's.

- 4.2.2 Where an unresolved incident is approaching the point at which conformance to the appropriate SLT is threatened, (*NB: This point needs to be defined*), the IMT will chase the appropriate SDU for progress updates. Powerhelp / Phoenix to flag when this point is reached
- 4.2.3 Where progress updates suggest that conformance to SLT will not be achieved, the IMT will obtain the estimated time of resolution from the SDU and communicate this by telephone to the incident raiser. This action shall be reported against the appropriate incident log within Powerhelp.
- 4.2.4 Should the IMT gain an unsatisfactory response from an SDU following a progress chase, the issue will be escalated to POA Service Management who will then own the responsibility for progressing the incident to conclusion with the SDU.
- 4.2.5 The IMT will then provide regular progress updates every (*TBA*) hours to the incident raiser should the incident remain unresolved.

NB: Refer to Service Level Targets Document for specific SLT measures.

4.3 Implementation of pro-active Problem Initiation within the IMT

- 4.3.1 The HSD will create a "Problem Management" stack within Powerhelp. This stack will be used to log problems in accordance with Section 3.4 of the document entitled: ***Horizon Service Desk, Service Description. Ref: CS/SER/023***
- 4.3.2 POA will allocate a dedicated POA / HSD Problem Manager to the HSD. This resource will report into POA but will be co-located with the HSD. This resource will filter all identified problems initiated by the IMT prior to logging on the Powerhelp stack (see section 4.3.1) in accordance with Section 3.4 of the document entitled: ***Horizon Service Desk, Service Description. Ref: CS/SER/023.*** The POA / HSD Problem Manager will review the IMT output and will appoint a POA Problem Manager where required. ***NB: POA will ensure the availability of this resource working in conjunction with the HSD in providing cover during periods of absence.***
- 4.3.3 The IMT will monitor the Problem Records within Powerhelp on a weekly basis and escalate to the dedicated POA / HSD Problem Manager where the Problem Record appears not to have been updated or actions appear to have been delayed.
- 4.3.4 The IMT will ensure that any KEL delivered, as a result of problem root cause analysis is available to the HSD.

4.4 Development and sign off of Incident and Problem Management Processes

- 4.4.1 POA resource will review and if appropriate amend Incident and Problem Management processes
- 4.4.2 The HSD will be required to approve with POA the Incident Management processes within the document entitled: ***Incident Management Process: Ref: CS/PRD/074***

- 4.4.3 The HSD will not be an approval authority on the document entitled: *Problem Management Process: Ref: CS/PRD/021*

4.5 Development and sign off of the HSD Service Description Document

- 4.5.1 POA will complete the document entitled: *HSD Service Description. Ref: CS/SER/023*
- 4.5.2 The HSD will agree this document with POA that will then become a Contract Controlled Document within Schedule 19 of the Agreement between Fujitsu and Post Office Ltd.
- 4.5.3 The HSD will complete an “internal” HSD Service Description / OLA that will describe the processes, reporting and targets used in the delivery of the HSD function to POA.
- 4.5.4 POA will approve this document with the HSD

4.6 New reporting of incidents in place and delivered to the customer (via POA)

- 4.6.1 The IMT will provide daily reporting to POA showing:
- 4.6.2.1 The number of unresolved incidents by SDU and problem code & definition for non post office branch raised incidents
- 4.6.2.2 The number of unresolved incidents raised by post office branches showing:
- Powerhelp call reference
 - FAD code
 - Branch name
 - Branch postcode
 - Problem code & definition
 - Cause code & definition
 - Latest update and expected resolution timescale
 - Time / date / information relayed to Postmaster in telephone update
- 4.6.2.3 The number of resolved incidents by SDU, problem code and cause code
- 4.6.2.4 The discrete daily, cumulative monthly and cumulative quarterly SLT performance for incidents falling into the Hardware, Software and Network problem types
- 4.6.2.5 The discrete daily, cumulative monthly and cumulative quarterly SLT performance for incidents falling into the Level 1 and Level 2 SLT categories.
- 4.6.2.6 The discrete daily, cumulative monthly and cumulative quarterly SLT performance for incidents where a re-boot has been required to restore service.

NB: POA MSU currently report on this SLT. This process will be transferred to the HSD within a structured handover of process which will include 1-2-1 training where necessary of IMT staff by POA MSU.

4.7 Identify and re-brand functions outside the current HSH which will “Shift to the left” under Phase Three and Four

- 4.7.1 Core Services & POA will identify those functions within the SMC that can be logically moved into the HSD environment, (Front Line or IMT), as part of the wider HSD within Phases Three and Four
- 4.7.2 Core Services will identify those functions within UKME that can be reviewed with the option of closer management or transition into the Front Line or IMT as part of the wider HSD subject to operational limitations.
- 4.7.3 Those functions identified within 4.7.1 and 4.7.2 above will be “re-branded” as HSD functions within this phase although their location, reporting lines and job content may well not change within this phase.

4.8 POA to deliver the first set of requirements to Powerhelp Development team

- 4.8.1 POA to deliver the first set of requirements to allow further developments to Powerhelp / Phoenix reporting and incident classification.
- 4.8.2 The HSD to impact this document and provide a realistic timescale for implementation, defining “quick wins” and coding changes as a priority enable more effective incident management.

5.0 Phase 3: Implemented from 01 July 2005

5.1 Review of Incident and Problem Initiation processes within the IMT

- 5.1.1 The IMT will review with POA the end to end Incident and Problem initiation processes introduced in Phase One and Phase Two.
- 5.1.2 The IMT will amend processes and introduce new processes where deficiencies and / or omissions have been highlighted

5.2 “Shift to the left” of processes identified within Phase Two to create a unified HSD

- 5.2.1 Move functions identified in Phase Two 4.7.1 (phase 3 only) & 4.7.2 into the HSD environment.
- 5.2.2 Integrate functions into First Line and IMT processes

5.3 POA to deliver the second set of requirements to Powerhelp Development team

- 5.3.1 POA to deliver the second set of requirements to allow further developments to Powerhelp / Phoenix reporting and incident classification.
- 5.3.2 The HSD to impact this document and provide a realistic timescale for implementation, defining “quick wins” and coding changes as a priority enable more effective incident management.

5.4 Identify and re-brand functions outside the current HSH which will “Shift to the left” under Phase Four

- 5.4.1 Core Services & POA will identify those functions within other SDU areas other than SMC and UKME that can be logically moved into the HSD environment, (Front Line or IMT), as part of the wider HSD.
- 5.4.2 Those functions identified within 5.4.1 above will be “re-branded” as HSD functions within this phase although their location, reporting lines and job content may well not change within this phase.

5.5 Establish links to existing configuration and asset management systems

- 5.5.1 HSD to use existing configuration and asset management systems in their analysis and impact of incidents and problems. (See section 1 bullet 4)

6.0 Phase 4: Implemented from 01 October 2005

6.1 “Shift to the left” of processes identified within Phase Three to create a unified HSD

- 6.1.1 Shift to the left those functions identified in Phase Three 5.4.1 and 4.7.1 (phase four) into the HSD environment.
- 6.1.2 Integrate functions into First Line and IMT processes

6.2 Incorporate Day J Data Retrieval function from POA into HSD

- 6.2.1 The IMT to take on the Day J Data Retrieval function from POA Business Unit. This function requires a resource of approximately 1 man-days effort between 08.00 and 18.30hrs Monday to Saturday.

6.3 Refine links to configuration and asset management

- 6.3.1 HSD to refine links to existing configuration and asset management systems to improve the analysis and impact of incidents and problems.(See section 1 bullet 4)



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6.4 Implement Powerhelp changes scoped within Phase Two and Three